



Don't pay extra tax.

February 2016

The Federal Government laws relating to superannuation tax and Tax File Numbers (TFNs) could result in you paying extra tax unnecessarily.

Hostplus is authorised under the Superannuation Industry Supervision Act 1993 to ask for your TFN and we recommend that you provide it.

You are not obliged to provide your TFN and declining to do so is not an offence. However, if you don't provide your TFN:

- employer contributions and any salary sacrifice contributions could be taxed at the highest marginal tax rate plus Medicare levy*
- we cannot accept any personal, spouse or certain other types of contributions you make
- benefits paid to you may be subject to tax at the highest marginal rate plus the Medicare levy (this may be recovered after lodgment of your tax return), and
- in the future, Hostplus may not be able to locate and amalgamate multiple benefits that we may hold for you.

The consequences of not providing your TFN may change in the future as a result of changes to legislation.

*The extra tax may be refunded if you supply your TFN within four years of the end of the financial year in which the contribution is made.

If you elect to provide your TFN, Hostplus is required by law to properly safeguard it and only use it for approved lawful purposes.

These purposes include:

- to assist in searching for and amalgamating your superannuation benefits in Hostplus where other information is insufficient
- to advise the Australian Taxation Office when a benefit is paid to you or if you have unclaimed superannuation money when you reach the government's pension age
- to assist the ATO in determining your eligibility for the government co-contribution scheme, and
- to deduct concessional contributions tax at 15%.

These purposes may change in the future.

If you provide your TFN, Hostplus may also forward it to another regulated superannuation fund or retirement savings account (RSA) if your benefit is transferred or rolled over in the future (unless you request in writing for this not to be done).

Your TFN may also be forwarded to the Commissioner of Taxation.

i You can provide your TFN by:

- Visiting hostplus.com.au/tfn and looking for the TFN icon. You will need your member number, date of birth and TFN.
 - Mailing this completed form to:
Locked bag 3
Carlton South VIC 3053
 - Calling **1300 467 875**
-

Tax File Number notification form.

February 2016

1 Consider providing your Tax File Number (TFN).

I wish to provide my Tax File Number to Hostplus.

Given name*

Middle name

Surname*

Membership number*

Tax File Number*

Is this the first time you have provided your TFN to Hostplus?

Yes – please proceed to step 2.

No – please attach documents requested below.

i There are extra requirements if this is a change of Tax File Number.

If you have previously supplied your Tax File Number to Hostplus but now wish to advise us of a new TFN, please attach a certified copy of your ATO advice. In addition to supplying your ATO advice, please also attach certified copies of any two of the following:

- current bill (eg. power bill) showing your present address
- birth certificate
- bank statement
- driver's licence
- passport
- marriage certificate
- deed poll
- change of name certificate
- divorce certificate

How to certify documents.

Step 1.

Make a copy of the original document/s. All copies must be clear and legible before certifying.

Step 2.

Take the original identification document and a photocopy of both sides of the original document to an authorised person. We are unable to accept certification on the reverse side of the photocopied document.

The authorised person needs to:

- Write or stamp in English on the photocopies: 'This is a true and correct copy of the original.'
- Write or stamp their name, address, occupation, business hours telephone number, date and registration number (if applicable) and sign each photocopy.

Who can certify documents

- chiropractor
 - dentist
 - nurse
 - registered medical practitioner
 - pharmacist
 - psychologist
 - veterinary surgeon
 - legal practitioner, who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia
 - Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
 - bank officer with two or more continuous years of service
 - chief executive officer of a Commonwealth court
 - finance company officer with two or more years of continuous service
 - judge of a court
 - Justice of the Peace
 - magistrate
 - member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
 - minister of religion
 - notary public
 - officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more years of continuous service with one or more licensees
 - permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public
 - police officer
 - Registrar, or Deputy Registrar, of a court
 - teacher employed on a full-time basis at a school or tertiary education institution.
- * For a complete list of people permitted to certify documents go to hostplus.com.au/id



Important: please don't send original identification documents to Hostplus.

2 Use of the ATO's Super Match Facility.

The ATO has made this facility available to all Superannuation funds to:

- Assist members in finding lost Superannuation;
- Assist members in locating any unclaimed monies that the ATO may hold; and
- Assist and better inform members of all their Superannuation interests.

By providing your consent to use your TFN for this purpose, we will access this facility and provide you with all the applicable information on your Superannuation arrangements by either email or letter. Please note that your consent will be ongoing until it is revoked by you.

By ticking this box, I agree to Hostplus using my TFN to access the ATO Super Match system and acknowledge that this consent is ongoing until I revoke it with the fund. Please sign the declaration at Step 3.

3 Sign the declaration.

By signing below, I indicate my agreement to the use of my TFN as outlined above. I consent to Hostplus collecting, using, storing and disclosing the information supplied by me for the purposes of administering my membership in accordance with the Hostplus Privacy Policy.

Your privacy

Hostplus is seeking to collect personal information from you today so we can identify your superannuation account with us and process your Tax File Number update. The personal information we are seeking to collect from you is your name, membership number and Tax File Number. We need to collect the requested

personal information from you to give effect to your instruction. If you do not provide us with this information, we may not be able to carry out these instructions.

The Hostplus privacy policy is available on the Hostplus website at www.hostplus.com.au/privacy and includes information about overseas disclosure of personal information, how you may access and seek correction of your personal information as well as how you can make a complaint about a breach of your privacy.

Hostplus usually discloses your personal information to our administrator Superpartners, mail houses and the ATO.

Signature of applicant*



Date*



Faxed or scanned forms cannot be processed. However photocopied forms can be processed if signed with an original signature.



When you have completed this form please send it to: Hostplus, Locked Bag 3, Carlton South VIC 3053

